

WIC Futures Study Group

May 27, 2010
Holiday Inn Conference Center Downtown
22 North Last Chance Gulch, Helena, MT

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Introduction

In response to financial, structural, and operational challenges within the Montana Women, Infants, and Children (WIC) nutritional program, the WIC Futures Study Group was convened to evaluate and revise the WIC service delivery system to provide effective, efficient, and high quality services to the greatest number of participants possible.

The ninth meeting of the group was held on Thursday, May 27, 2010. The following is a report of the meeting activities.

Participants included:

Mary Beth Frideres	MPCA
Joan Bowsher	DPHHS/WIC
Kim Mondy	DPHHS/WIC
JoAnn Dotson	DPHHS/FCHB Chief
Mark Walker	DPHHS/WIC
Carrie Reynolds	DPHHS/WIC
Jane Smilie	DPHHS/WIC
Linda Best	Deer Lodge/Beaverhead County WIC
Ellen Leahy	Missoula Co. HD
Jeannie Siefert	Dawson County HD
Peggy Stevens	Mineral County HD
Lora Weir	Teton County HD
Bill Hodges	Big Horn County HD
Terri Hocking	Butte/Silverbow HD
Kathleen Jensen	Sheridan County HD

On the phone:
Corrine Kyler, DPHHS/WIC

Observers:
Darcy Hunter - Gallatin Co. HD;
Stephanie Murphy - Gallatin County HD;
Karen Dwyer - Sanders Co. HD;
Gail Espeseth – RiverStone Health;
Shawn Hinz - RiverStone Health;
Dorothy Bradshaw – Lewis and Clark Co. HD
Melissa, student nurse

The meeting was facilitated by Mary Beth Frideres of the Montana Primary Care Association. The desired outcomes for the session were as follows:

By the end of this session, participants will have –

- Met new members;
- Celebrated project accomplishments;
- Decided whether or not to support regionalization;
- Decided on FY2011 state WIC funding strategies;
- Determined what comes next.

Opening Comments

Opening comments were made by Joan Bowsher, DPHHS WIC Director. Introductions were then made and the group reviewed the agenda. New members were introduced: Peggy Stephens representing frontier and Terri Hocking, representing large counties, Jillian Brown (not present) district 6 HRDC, representing non profits.

State Update/Accomplishments

Joan Bowsher gave an update of the state WIC program as the last meeting of the WIC Study Group was held about one year ago. She covered the following topics:

- WIC newsletter
- Local agency conference calls
- New food package roll out
- Training
- The implementation of M. Spirit – the new product was not as robust as expected but making improvements
- Will be rebranding WIC
- Farmer's market and fruit and vegetable benefit
- EBT planning
- Survey results
- Incredible Choices Toolkit

Joan then reviewed the information provided to Study Group members which included the state WIC program budget, OA projects, three spreadsheets which used the same formula as last year with participation based on the highest two months, six months, and one year, a list of participation numbers through April 2010, a copy of the cost allocation plan for 2010, survey results, and a copy of a letter sent by a WIC program director.

Regionalization

Joan then introduced the topic of regionalization. It is important to decide how to handle this topic before discussing the funding formula. Does the group wish to use the same regions for the funding formula?

Linda Best offered that new approaches should be studied, for example, technology could be used for rural and frontier access. The issue needs to be researched, she said, options and the cost of options should be thoroughly examined, but there is not enough time today. Others offered that quality must be evaluated – are we going to herd people or provide quality services? Some of the smaller counties said that they receive little, if anything, from the lead agency. Oversight, communication and service delivery is not happening, added another. Some are questioning why they agreed to be a part of regionalization.

Ellen Leahy told the group that the Large Caucus had met and decided that their message to this group is: No additional funds should go toward regionalization – the funding should remain the same. This year could be difficult.

One participant said that they need the state to say to all that you must follow the guideline and not make up your own rules – enforcement is needed. One person said the current system of \$4,000 to the lead agency does not work, especially if you are a lead with more than one county. Another person noted that there is more hardship to travel now in the bad economy. The participants agreed that the issue must be studied. One person warned that there may not be services in some small towns as a result.

The group decided to form a plan of action. This proposal was received unanimous group support:

A subcommittee of the Study Group will be formed to focus on regionalization issues. The group will be shepherded by Linda Best and will have representation from the WIC Study Group county size structure (frontier – Peggy and Cathy, small - Linda, medium - Bill, and large - Terry) and Joan will ask Jillian to represent nonprofits and Tom to represent Tribal interests. Jane will also be a part of the committee. Linda can recruit experts who are not Study Group members, as well. Joan and other state staff will participate in and support the group activities. Funds for travel and conference calling capability will be provided by the state. A written proposal will be developed by the subcommittee and sent out to Study Group members in draft form by January 1, 2011. The refined proposal will be brought back to a one or two day WIC Study Group face to face meeting close to the end of January 2011. The proposal will be fine-tuned with input from Study Group members and finalized to present to the State WIC Program director by January 31, 2010. First step – Linda will arrange a conference call in June.

Development of the WIC Funding Formula

Joan reviewed some of the components of the funding formula to be considered: difficult to project carry forward funds but waiting for a call from Corrine who is working on this from home where she is on orders for bed rest, OA funds were reviewed – these make the budget go up and down, request for caseload maintenance funds is included but difficult to project actual amount to be awarded.

Study Group members expressed concern about the rising costs to the WIC budget of the State Cost Allocation Plan. This plan is developed by the Department of Administration but DPHHS administration is involved in the decisions. The fast upward sloping trend of this allocation is hurting the delivery of food to WIC participants. One participant offered that the caseload has increased 3%, the money available has gone down 4%, and the cost allocation for the WIC budget has increased 70% over the past 6 years. The group felt that something must be done because this is a disincentive to increase the caseload. The upward cost trend is disturbing.

The group decided to form a plan of action. This proposal was approved by unanimous vote: Ellen Leahy will shepherd an effort to meet with DPHHS administrators and encourage them to examine the cost allocation plan impacts on the WIC budget, and to reconsider and reduce the cost allocation in the face of its impact on WIC clients. Representatives (frontier – Peggy and Cathy, small - Linda, medium - Laura, and large - Ellen) from the Study Group will join AMPHO representatives, if necessary. As a first step, Ellen will meet with Jane Smilie. Jane said she would like a chance to meet with Joan, Joanne, and the state financial experts to see if she can come up with a solution before meeting with Anna Whiting Sorrell.

Two group participants asked Joan why the local allocation is decreased by \$42,000 on the budget spreadsheets. Joan called Corrine who explained that adjustments to contracts throughout the year for special project needs are reflected in expenses from last year. Those costs were not included in this year's proposed budget. Corrine also told Joan that she projects \$200,000 in carry forward funds which were not on the spreadsheet. This was great news for the Study Group. It then broke into caucus groups where discussions about how to spend the unexpected extra money took place.

Upon their return, the Frontier, Small, and Medium Caucus proposed that the extra money should be used to supplement funding for rural and frontier service delivery. Lora Weir said that providing services in frontier and rural areas is more costly and this should be reflected in the funds that come to those counties. The Frontier, Small, and Medium Caucus, therefore, proposed a banding system which would enhance funding to the rural and frontier areas. For example, clinics with 0-400 clients could receive \$180/client, clinics with 400-700 clients could receive \$170/client, and clinics with over 700 clients could receive \$160/client. Or, the group proposed, some of the money could be used to provide more lead agency support, perhaps based on how many counties each lead oversees.

The Large Caucus proposed that no additional funds be used to support lead agencies as was stated earlier. Ellen said that rural and frontier clinics already receive benefit within the current formula, an acknowledgement of the fact that providing services in rural areas is more costly. In addition, the large population county data shows that they are performing well in regard to average cost/client. Ellen said she does not want to do anything that will

jeopardize the overall caseload. Ellen cautioned that if funds are taken from the larger, more urban areas, the total caseload will drop significantly and that would hurt the overall program.

Many comments then came from the representatives of the Frontier, Small, and Medium Caucus members. Several participants made the point that providing WIC services costs more than the funds they receive from the state. Some are considering not providing WIC services in the future. Some do not want to be lead agencies. Who will provide WIC services if agencies back out? One participant said that there will be greater need for WIC services in the future as 80% of the population may fit the guidelines. One participant returned to the group's guiding principles. She wondered if the formula should be based on the % of poverty in each county. Laura offered another suggestion which involved using a smaller amount to supplement the rural and frontier counties. That would be difficult, another member said, when you consider Yellowstone County, a large population county that serves small population counties.

Joanne noted that this is where we were last year – concerned about tinkering with the regional lead structure and doing it before the regionalization committee discussion. \$2000 base rate per local agencies is a problem – 200 or 2,500 clients – the agency gets the same rate. Ellen said there is strong support for the \$2000 base rate in recognition of the small counties. Jane said that the formula is built on something “a little bit flawed.” She cautioned the group against too much change before the regionalization decision is made. Ellen, from the Large Caucus, said that using the banding proposal would cause a decrease of 600 participants in Yellowstone County due to a decrease in funding. She cautioned the group about using the new found carry forward money for more than this year. We may not have it next year, she said.

Some participants felt that staying with the current formula might be the best way to go right now. The facilitator asked the WIC Study Group “Is there was anyone in the room who could not live with leaving the formula the way it is for this year?” Hearing no responses, the facilitator noted that it seemed like the consensus of the group was to leave the formula used last year in place. The group agreed that the formula will be re-examined next year, after the subcommittee work on regionalization is finished and the state has approved a new plan.

Other Issues

The facilitator asked the group if there were other issues to discuss. Ellen noted that data could be used to gain monetary recognition on the federal level for our immunization rate which is 50th in the nation.

Shawn identified a problem with the M Spirit system that makes it difficult to have birth date data at hand. Mark told the group that this had been identified and was on the list for a fix by January/February of 2011. When the state implements a reporting tool, this issue can be addressed there.

Bill asked if there was anything in the federal or state law or rules that would prevent using WIC funds to match those of a private foundation. For example, could we get a private foundation to help buy a mobile van to help with rural/frontier access? Joan said she did not know why that couldn't work with OA funds or infrastructure funds but she would check to make sure that such a proposal would be ok.

Ellen proposed that the regionalization subcommittee consider what is being done with telemedicine. Other members said that some are using computer cameras now and that expansion of that less expensive option should be considered. One of the participants reminded the group that these types of proposals received support from Jean Liekhus from the Regional WIC office. Another noted that the new system offers other ways to be more efficient, such as the ability for state staff to use the technology to review files remotely for monitoring visits. This has reduced the time for monitoring visits from two days to one.

Next Meeting

The next face to face meeting of the Study Group will be scheduled for the end of January, 2011. The regionalization subcommittee will have their first conference call by the end of June 2010.

Evaluation

In regard to what participants liked about the meeting, several members mentioned that they feel that group members are working well together and that the meeting was good. One person said that they appreciate the respect in the group and another said they appreciate the group's open-mindedness. One person expressed their gratitude to the state for all of their work and support, especially through the new system rollout. Another appreciated the honesty of the state representatives and acknowledged that in some discussions, the state staff were vulnerable. A new member to the group noted that the process was interesting, that members openly share concerns, and that the networking is valuable. Several members were thankful for the \$200,000 carry forward funds that were identified. Another said that they appreciated the open dialogue and the contribution of the state staff. "We are celebrating the past and defining our future," he said. Several members appreciated the time given for the Caucus groups so that issues could be discussed and then brought back to the whole group to work on consensus. Some mentioned that they were glad the group decided to dig into the regionalization issue. One said they were glad the group could reach resolution within a day. One participant said it was good that group members were willing to compromise. Another said they appreciated the open forum where people can voice their opinion. One participant said they enjoyed listening to everyone's point of view. Another appreciated that some on the Study Group were willing to take on the regionalization issue and put a timeline together. The day resulted in "some decisions and directions for change," one member added.

As to what should be changed or done differently in future meetings, one participant would like to see data regarding the cost per client analyzed annually. Another would have liked to have the correct information ahead of time so that it could be discussed before the meeting. One person would like to meet in a room with daylight. One mentioned that they wished the tribal representatives were at the meeting. Another person suggested the next meeting be held on a reservation to make Indian participation easier. One person mentioned that at times, it felt as if members of the group had an attitude that some did not understand the issues, only others understood them. One person reported that they felt their comments were questioned unfairly and they felt judged. They suggested that each person be allowed to come to a point of understanding in their own way.

Public Comment

The facilitator asked the observers if they wanted to add their comments. One person noted that there were returning members and new members. Several were impressed by the commitment of the group, as well as the state representatives. One offered their thanks and acknowledged the good work of the group to date. Terry's membership as a representative for large counties was acknowledged and appreciated. Others noted how positive it was that information was shared. Thanks were offered for allowing observers. One person said that the food was excellent. Another suggested tele-video be used. Another observer noted that it was the first time she attended and that it was "rewarding how everything comes together."